

## MEMORANDUM

TO: All Participants of the August 2003 Charter Operator Meetings  
FROM: Anthony A. Gruebl, Chief Operating Officer, CER  
DATE: September 15, 2003  
RE: Survey and Trip Report and Next Steps

Dear Charter Leader:

Last month, Jeanne Allen and I traveled to Arizona to meet with you and other key individuals within the state's charter community. The purpose of our visit was to learn about the issues that most concern charter leaders and begin to formulate a vision for how the state's movement can best be served. We met in three separate groups with nearly 60 school leaders; six key legislators, most of whom we've known for a long time; board members and the president of the association, the state's authorizing board leaders, Onnie Shekerjian, and Mary Gifford, and others.

We were disappointed that we could not meet more individuals including those from Northern and other rural parts of Arizona, but time did not permit. We have communicated by phone with many who did not attend the meetings. CER conducted a survey, detailed below, that provided us with insights into the attitudes of school leaders. Together with our visits and long-time involvement with your state's charter community, we are pleased to offer our assessment of how Arizona's charter movement can grow and become a more effective force in the state.

### Survey Results

Our trip followed a telephone study of 125 Arizona charter schools commissioned by the Center for Education Reform (CER) to measure the level and quality of assistance charter school operators receive from various state-based and national organizations and to determine whether the operators actually received all of the help they want and need from these organizations. The information we learned during our in-person meetings confirmed the results of the survey. The full survey report is attached, but in summary:

- Charter school operators in Arizona repeatedly indicated that while they appreciate the assistance provided by various organizations offering assistance to charter operators in the state, their needs are not being met in such a way as to

ensure the success not only of their individual school, but also of the movement as a whole;

- The quality of the assistance being provided is not at the level where charter schools feel confident enough on being wholly dependent on one organization for assistance and guidance;
- Charter school leaders often consult "people" rather than "organizations" for help. There isn't a clear consensus among all of the operators that a "one-stop-shop" exists to serve their every need. There is a large minority of charter operators who are not familiar or even aware of support organizations, and it may represent a special category of charter schools in need of information about support options, and;
- Charter school operators would like to be told what they need, instead of having to request assistance on an issue-by-issue basis. The operators are too busy running their schools. They do not have the time to 1) figure out exactly what they need, 2) figure out if what they are getting is good enough, and 3) ask for guidance and assistance on every issue.

While in Arizona, we conducted all of our meetings with the theme of "tell us what you need, where you turn for help, and what we can do." In all of these meeting, we heard comments and discussion that confirmed the survey results in addition to providing new information. The types of observations heard included:

- A majority of charter operators feel woefully un-represented in terms of technical help. Many charter operators devise their own solutions to problems that other operators also face, even though many of these problems have already been solved time and time again. Other operators turn only to those they know in the charter community or to informal networks for assistance. Some operators have taken the ACSA's "Charter 101" class, but they indicated that class was a good start but far short of providing deep knowledge. Some operators turned to the State Department of Education, even though many told stories of their experiencing numerous and repeated problems with some parts of the department, while other parts are performing quite well. Still others turn to the Charter Board for assistance, which has no real mandate or requirement to assist charter school operators beyond authorization and oversight.
- A majority of charter operators feel that the level of advocacy for charters should be increased and that they want to play a larger role in coordinated advocacy. The Legislators and staff that we met with confirmed this and said that they almost "never" see the charter people and if it weren't for a handful of these folks, and a few original charter operators who have been present from the beginning of the movement in Arizona, charters would face many more challenges legislatively. Even Tom Horne, the Superintendent, when asked what he thought we could best do to help his state's charter schools, responded that we could teach them how to be more politically astute. One legislative assistant said that the Home School Association is better represented and garners more attention from legislators than the charter school community. There is a real and dangerous disconnect between

leadership, grassroots (i.e. schools and parents) and the political leadership in the state.

- A majority of charter operators feel under-represented in terms of broad networking and support.
- Most charter operators reported a negative view by the press as a major obstacle to building broad support for charters across the state and thought that more should be done.
- Other charter operators felt that parents were not being educated about the successes within the state by charter schools and that they still believe that charter schools are schools of last resort for hard to educate kids.
- On ASCA and its Board, some observed that much has been done recently to improve the professionalism of ASCA, but that the association very much needs help with its evolution. We heard that the association board makeup is seriously flawed; the board is dysfunctional and fractured, preventing real progress. The association is growing and has made progress, but many charters pointed out that it still represents fewer than 50% of the state's charters. While we would have liked to see more openness about how the state's association could be more responsive to charter operators, some Association representatives were defensive. We reiterated over and over again that our effort was aimed at building up institutions and that with charter schools at a political cross roads, evaluating strengths and weaknesses is a must.

Only a small but vocal minority think that the condition of support for and on behalf of charters in Arizona is satisfactory without having to strengthen their organizations, infrastructure, and movement within the state. However, a large majority of the leaders and operators that we met with acknowledged deficiencies and requested that CER assist them in building a system to improve the states charter movement and infrastructure.

### **Our Mission and How We Would Like to Assist**

The Center for Education Reform (CER) is a national voice for more choices in education and more rigor in education programs, both of which are key to more effective schooling. It delivers practical, research-based information and assistance to engage a diverse lay audience — including parents, policymakers, and education reform groups — in taking actions to ensure that US schools are delivering a high quality education for all children in grades K-12.

As a leading national grassroots advocacy not-for-profit organization, CER supports the infrastructure, organizations, and charter movement across the states, especially those key states critical to the movement nationally. Among states where CER is currently most active, Arizona is one of the most important among its Tier 1 states which also include California, New York, Michigan, Indiana, and Washington, DC. In each of these states, we have been invited to better understand the needs of the charter operators and assist the leaders in improving their infrastructure to provide for those needs. We have provided that assistance in multiple forms, with varied intensity, and with different

resource commitments. Much of our assistance is provided mostly in the form of our time, leadership, and broad knowledge of the best practices employed across the states. Our level of engagement depends upon the state and the willingness of its key individuals to champion improvement and change.

In each state we have produced positive results. In each state, we have invited all to participate, but have excluded those who demonstrate that they are satisfied by the status quo and protective of their own interests. Our job is to apply our limited resources of knowledge, labor, and capital to produce the highest gain possible in each state.

Based on our survey and meetings, we believe that Arizona has a strong charter community, talented leaders, and a propensity and desire to grow and strengthen its organizations, infrastructure, and movement. It has a great deal of which to be proud, including that it continues to have the top ranking charter law one of the best charter authorizing boards nationally. Operators are becoming highly successful - more than half of the top fifteen Stanford 9 scores were achieved by Charter Schools.

Our findings also suggest that the infrastructure in Arizona continues to need improvement to truly serve the needs of all charter schools, define the most important issues, and provide high quality, timely assistance on an ongoing basis. The charter operators and leaders we met with confirmed this and invited us to work with them and through the ACSA to help improve these things. There are however voices outside of ACSA that must be included.

Based on our experience in other states as well as the unique nature of Arizona, we believe that the charter leaders must develop a plan for the future of the charter movement in Arizona under which its operators can unify. Arizona must chart its course.

### **Next Steps**

CER has been asked to help facilitate the beginning of this process with the goal of Arizona creating its own strategic plan within the next six to nine months. We have invited key individuals and leaders for Arizona to come together to jump-start its strategic planning process and develop its long-term plan for Arizona's charter movement. Those you have said need to participate in this process include the following individuals:

- Susan Chan, President, Arizona Charter School Association - One other Board Member from ACSA will also be invited
- Debra Slagle, Board Member ACSA
- Onnie Shekerjia, President, Arizona State Board for Charter Schools
- Mary Gifford, Board Member, Arizona State Board for Charter Schools
- Chris Smith, Executive Director, Internet Education Exchange
- Cuyler Reid, Board President, Valley Academy
- Carol Ann Sammans, Head of Schools, EduPreneurship Student Center
- Dr. Mark Francis, Director, Arizona School for the Arts
- Damien Creamer, Director, Primavera Technical Learning Center
- Michael Ebner, Executive Director, The Montessori Schoolhouse

- Anjum Majeed, Principal, Self Development Charter School
- Gregory A. Miller, Co-Directors , Challenge Charter School
- Gurumeet Khalsa, Co-Directors, Khalsa School
- Steve Twist, Viad Corporation, former Board Member, Arizona State Board for Charter Schools

This meeting is scheduled for September 26 from 9:00 am to 5:00 pm. The meeting will take place in Conference Room 038, in the basement of the Capitol, located at 1700 West Washington, Phoenix AZ 85007.

To begin the meeting, we have invited Peter Thorp, vice-president of CANEC, California's statewide charter school organization, to share his insights into strategic planning and participate during the day to help lead the discussion. Peter's biography is attached.

We have also retained a strategic planning firm, Traverse Management Resources, to facilitate the discussion and present an appropriate strategic planning framework upon which to build Arizona's plan. Traverse provides a full range of professional services to facilitate effective planning processes and is led by Russ and Leslie Knopp. The firm comes highly recommended by Michigan's charter school association, MAPSA. Additional information about Traverse is also attached.

At the conclusion of this first strategic planning step, the strategic planning process must continue, with the meeting participants continuing to work to refine the strategy. CER will continue to help facilitate this process in ways to be defined at this first meeting.

We look forward to working with you on the initial steps to secure the continued development and growth of the charter schools movement in Arizona. Please feel free to call with questions.

Sincerely,

Anthony A. Gruebl  
Chief Operating Officer

### **Peter Thorp Bio**

Peter Thorp is the Executive Director of Gateway High School, recently recognized as a California Distinguished School. Peter was the founding principal of Gateway in 1998, but in his new capacity as Executive Director he spends about 50% of his time working with other charter school leaders to advance the interests of California's charter schools. Peter also serves as the vice-president of CANEC, the statewide charter school organization. Peter graduated from Williams College with a degree in art history, has an M.Ed. from Boston State College, and has done advanced study at the Harvard Graduate School of Education and the University of Colorado. Following college, he had a Watson fellowship to study city planning in Europe, and spent five summers working on a medieval dig in Southern France. Peter was also a Fulbright Scholar to China in the summer of 1983. Prior to becoming Gateway's principal, Peter was the headmaster of Cate School in Santa Barbara, California, and taught history for 18 years at Fountain Valley School in Colorado Springs.

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TRAVERSE MANAGEMENT RESOURCES, INC. provides a full range of professional services to facilitate effective planning processes. Partners Russ and Leslie Knopp are professional facilitators who specialize in working with organizations in transition and in using techniques that develop commitment to action and shared ownership among people with diverse interests.

## SERVICES

### ASSESSMENT AND ANALYSIS

TMR facilitates surveys, interviews, focus groups and research to ensure planning decisions are grounded in the reality of the current situation.

Recent Projects: Michigan Council for Arts and Cultural Affairs Statewide Visioning; Michigan Business Leaders for Education Excellence Report on the State of Education in Michigan

*"I knew we had set lofty goals and there was a great deal of risk involved but TMR's professional approach helped guide our diverse group through the process. The vision of the Education Alliance today is much more meaningful and dynamic as a result..."*

Jim Sandy  
Executive Director  
Michigan Business Leaders for Education  
Excellence

### FACILITATION AND CONSENSUS BUILDING

TMR designs and facilitates retreats, meetings, and processes to build practical, realistic visions for future success.

Recent Projects: Wolverine Power Cooperative Board of Directors Strategic Planning Retreat; Michigan Alliance of Information and Referral Systems Planning Retreat

*"Russ and Leslie are very effective at relating to the employees at GLE. This allowed them to gain valuable insight into the issues we had to deal with as well as prepare us for the development of meaningful objectives, goals and plans. With their leadership, we developed our vision, mission, principles and goals in a realistic time frame. Without them we would still be working on it. They are a great team."*

Max Binkley  
Vice President Human Resource  
Great Lakes Energy

### STRATEGIC AND OPERATIONAL PLANNING

TMR works with boards, employees and volunteers to develop long-range strategic plans, action plans and targeted strategies that move organizations efficiently and effectively toward their visions of success.

Recent Projects: Byron Center Public Schools Five Year Strategic Plan; Botanical Garden Society of Northwest Michigan Strategic and Business Plans

*"TMR makes the challenges of a strategic planning process simple, relaxing, entertaining, and complete. They open up your eyes to the similarities and difficulties to achieve a common goal..."*

Charles McCallum  
Executive Director  
Michigan Works! Berrien - Cass - Van Buren

### CHANGE MANAGEMENT AND CONSULTING

TMR provides customized training experiences, communications consulting, coaching, and support services to implement your strategies.

Recent Projects: Great Lakes Energy Communication Skills Training; Education Alliance of Michigan Update to Strategic Plan and Resolution of Organizational Issues.

## **Analysis of Charter School Operators Survey August 6, 2003**

### **Overview:**

In June 2003, The Center for Education Reform commissioned Red Sea Communications to conduct an independent survey of charter school operators. The purpose was to better understand the needs of charter schools so CER could assist in identifying and building a more effective infrastructure (and capacity) to serve charter schools locally or nationally. The methodology for this study involved a series of surveys among charter school operators in Arizona.

The goal of the surveys was to gauge the level and quality of assistance charter school operators receive from various state-based and national organizations, and to determine whether the operators actually receive all the help they want *and need* from these organizations.

The results of this survey provide the general types of services charter operators seek out, and have led to more clarity on what charter operators really need on a day-to-day basis.

### **Key Findings:**

After analyzing the results from the survey, CER has drawn the following conclusions:

- 1. Charter operators are aware that organizations exist that serve as resources for, or provide assistance to charter schools. However, there isn't one specific organization that respondents can identify.**  
For example:
  - 79% of the respondents said that they are aware of service providers for charter schools, both locally and nationally.
  - Only 36% of the respondents had "heard of" the Arizona Charter School Association.
  
- 2. An overwhelming majority of the charter operators say that they receive services from these organizations, and they appreciate the help. However, they want what they're getting, but it's not everything they need.**  
For example:
  - 91% of all respondents were satisfied with the quality of services provided.
  - But only 41% of the respondents said that the assistance was "sufficient," indicating that more assistance was needed.
  - The research suggests that while the level of "satisfaction" is high among the operators, it does not mean that their needs are being filled completely.
  - When asked which services were provided to them by the support organization, respondents said "legal advice," "budget/grant/fiscal



information," and "management procedures." But in **every** case, a higher percentage of respondents said that they still needed more assistance.

- Over half of the respondents said that the following types of assistance are important to them:
  - i. Special education
  - ii. Legal advice
  - iii. Networking with legislators
  - iv. Public relations
  - v. Legal advice
  - vi. Accounting needs
  - vii. Management procedures
  - viii. Teacher recruitment
- However, when probed further, respondents acknowledge that the only issues that they receive the most assistance with are "budget/grant/fiscal," "management procedures," "training/workshops," and "legal advice." Assistance with public relations, board issues, networking with legislators, teacher recruitment, and special education, while very important to the operators, is not provided as often as the operators need it to be.
- There is a clear indication that charter school operators need direct and timely assistance on the day-to-day aspects of operating a charter school.
- The analysis suggests that there needs to be a clear differentiation between the things that the operators need in order to ensure day-to-day success (board issues, student recruitment/PR) and those that they need for the movement as a whole to be a success (networking with legislators, legislative updates, financial viability, etc.).

**3. Charter operators are not concerned with the depth of knowledge or the level of assistance when judging the efficacy of the support organizations.**

For Example:

- When asked which aspect of the organization made the respondents most satisfied, the majority of them said "rapport/relationship."
- Factors such as "provided answers," "familiar with law," "networking opportunity," and "technical support," were hardly mentioned by respondents.

**4. Charter operators often rely on sources other than the service organizations for help.**

For Example:

- **40% of respondents who don't use the support organizations for help, go to their colleagues for assistance.**
- **35% of respondents are aware that organizations exist, but first go to the internet, or refer to their colleagues to find organizations that offer charter school support services.**

**4. There is a clear and strong indication that the schools, as a group, do *not* agree on what service (or services) they need most. Schools are more likely to take what an expert offers than to be able to tell an expert exactly what they want.**

For Example:

- When asked to identify the type of service or support they would request first, the largest number of respondents said, "don't know."
- Even as charter school operators are receiving ongoing help, they don't know what they are getting- or what they need.
- There is a large variation of services that charter school operators say the support organizations provide; yet there is no consensus on 3 or 4 main services that they can all identify as a group.

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**Conclusion:**

In these surveys, charter school operators repeatedly indicated that while they appreciate the assistance provided by the various organizations, their needs are not being met in such a way as to ensure the success not only of their individual school, but also of the movement as a whole.

The quality of the assistance being provided is not at the level where charter schools feel confident enough on being wholly dependent on one organization for assistance and guidance.

Charter school leaders often consult "people" rather than "organizations" for help. There isn't a clear consensus among all the operators that a "one-stop-shop" exists to serve their every need. There is a large minority of charter operators who are not familiar or even aware of support organizations, and it may represent a special category of charter schools in need of information about support options.

Charter school operators would like to be told what they need, instead of having to request assistance on an issue-by-issue basis. The operators are too busy running their schools. They do *not* have the time to 1) figure out exactly what they need, 2) figure out if what they are getting is good enough, and 3) ask for guidance and assistance on every issue.

From this, we conclude that an infrastructure should be in place to serve the needs of all charter schools, define the most important issues, and provide high quality, timely assistance on an ongoing basis.